

Foreword

This third edition of OECD Tourism Trends and Policies provides comprehensive policy analysis and statistical data building on the work of the Organisation's Tourism Committee and, for the first time, in partnership with the European Commission. The report serves as a tool to analyse tourism trends and policies, and reforms in organisation and governance in 51 countries, including all OECD and EU members.

OECD Tourism Trends and Policies highlights the important role of tourism as an economic driver, an export industry, and an engine for job creation. The potential of tourism for growth, in an uncertain economic climate, is also underlined, particularly in emerging tourism economies.

The report begins by exploring the critical role of governance, in light of the cross cutting nature of tourism. It provides examples of governance practices that help to facilitate an integrated governmental approach to tourism, including better definition of the roles and responsibilities of tourism organisations, the development of national tourism strategies, and the establishment of Destination Management Organisations.

It then goes on to consider the issue of evaluation in tourism, where there has been a growing recognition of the need for robust evaluation of policies and programmes. It includes an evaluation road map, which outlines a series of steps necessary for effective evaluation.

The report also examines policy approaches to skills development in tourism, highlighting the increasing gap between labour demand growth and labour supply, and the need for tourism employers to develop strategies to remain competitive with a smaller but better trained workforce. Indeed, fully addressing labour and skills shortages requires a national tourism strategy that includes a workforce development strategy.

This year, OECD Tourism Trends and Policies includes new countries, new data, and indicators, with all tables and figures available on line. Data included in the detailed country profiles have been used to produce synthesis tables on international tourism, travel receipts and expenditure, and domestic and inbound tourism consumption. The areas addressed for each country include tourism in the economy, tourism organisation and budgets, and an analysis of tourism-related policies and programmes.

The report benefitted from significant contributions, feedback and guidance from policy makers and statisticians from both OECD countries and non-member economies, all of whom worked closely with the Secretariat to accurately present current policies, good practices, and a wide range of statistics.



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